

## Four Best Practices for Managing Emails in Outlook

Using your email account is convenient and allows you to reach a worldwide audience in seconds. However, email has introduced challenges to our ways of working and technology infrastructure. Here are the top four ways that you can use your email account more efficiently.

### 1. Attachments

Individual email accounts can become unwieldy with hefty and numerous email messages. The most frequent cause for Outlook account overload is the practice of including attachments with email messages. Here are some ways to avoid this predicament and communicate efficiently through email.

- **Collaborating on documents** – rather than emailing multiple versions of a document that your team is working on, store the document on a shared network drive. As updates are created, note the version number. That way all drafts and the final copy are accessed in one place. (If it is appropriate, drafts can be deleted from shared drives once the official version is in place.)
- **File size** – if you really need to send a large attachment via email, be considerate of others' email storage space and compress/zip the file, for example by using [7-Zip](#). Alternatively use <https://collect.gmul.ac.uk> to upload files for others.
- **Send hyperlinks instead of files in emails** – you can send a hyperlink to a file instead of an attachment to recipients. This will work if your email format is HTML or Rich Text, the document is stored on a common network drive rather than your personal drive, and the file path is 255 characters or less.
  - i. First, verify that your email format is in HTML or Rich Text format. On a new blank message, go to the 'Format Text' tab and select HTML or Rich Text. To make sure this is always the case go to File>Options>Mail and check under 'Compose Messages' that one of these is selected as the default format.
  - ii. Now to send an attachment as a hyperlink, click on the 'Insert' tab in the message. Select Hyperlink from the ribbon and drill down to the specific file on your shared drive and click OK. Your document path is now in the body of the message!
  - iii. Remember – the entire hyperlink must be 255 characters or less to work (this includes spaces) and the document must be on a shared drive in common with the recipient for it to open.
- **Paste document content into emails and save space** – if the content is all that the recipient needs, then copy and paste the text into the body of your email message or select this as an option from the Insert button's drop down (Attach File>*select file*>Insert as text). This practice makes the size of your message substantially smaller. Also, think about copying and pasting only the relevant segments of a document to share in your message.

### 2. Emails can be records

The vast majority of emails - such as internal announcements and newsletters, replies to meeting requests and where the recipient has been copied for information - do not need to be kept for the long term and you should regularly delete these. However, some emails serve as College records. What makes an email a record?

- It documents a business activity, decision, policy, right, or obligation
- It has business, operational and/or historical value

- It is required to be kept by law

Please contact the Records & Information Compliance Manager if you have any questions about emails that serve as records and how long you should retain them. For information about what should be retained and how long, please see the [Records Retention Schedule](#) and for guidance on what can be safely deleted see the 'Routine Destruction' worksheet thereon.

### 3. Saving emails that are records

So, you have an email that is a record – what is the best way to save it?

- **If you have an email with an attachment, consider if you only need the accompanying document to be saved or if the email message is important to understand the context of the attachment.** If you only need the attachment, save that document on its own on a network drive. But if you need to save an email or an email with an attachment, proceed to the next point.
- **Drag and drop the message to a network folder or open the message and click on File>Save As** – by placing the email in one of your department's network folders you are ensuring that the information is protected. IT Services regularly backs up these locations. Also, by dragging the message over to the network drive, you are maintaining the original format of the email, that is .msg. Once the email is safely in your department's shared drive you can delete it from your inbox.
- You can only drag and drop individual messages or a number of selected messages, not entire folders that are a part of your inbox.
- Create folders for your email files by topic and time period to make them easier to locate and assign a retention period.

### 4. Sent & Deleted Items Folders

Your Sent Items folder contributes to your email account size. Despite the generous mailbox size with Office 365 it is a good idea to regularly clean out your Sent Items folder of emails that are taking up valuable storage space by deleting or saving to the shared drive.

Don't forget that your Deleted Items folder also contributes to your email account size: go to File>Cleanup Tools>Empty Deleted Items Folder to empty it. Even better, have your Deleted Items folder automatically empty every time that you exit your email account: go to File>Options>Advanced and under 'Outlook start and exit' check the box to Empty Deleted items folders when exiting Outlook. Otherwise the Deleted Items folder is emptied every 30 days.

#### Further Information

> Email Dos and Don'ts:

<http://www.arcs.qmul.ac.uk/qmstaff/governance/information-governance/email-dos-and-donts/>

> Records Management pages:

<http://www.arcs.qmul.ac.uk/governance/information-governance/records-management/>